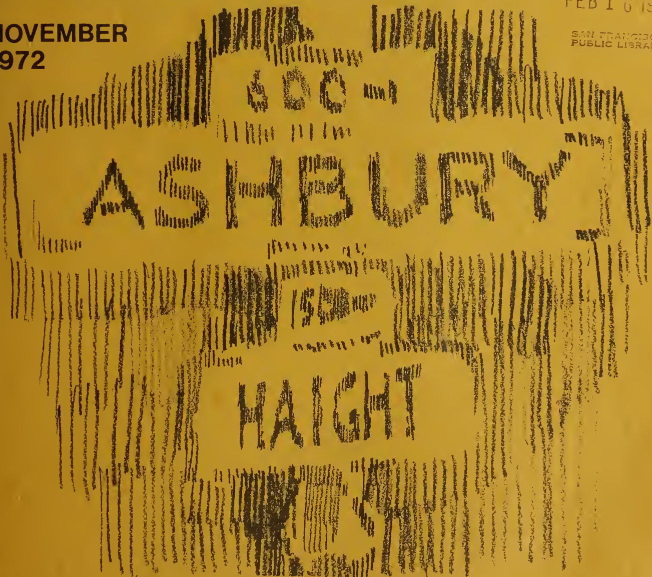
HAIGHT STREET SHOPPING AREA

a background study

NOVEMBER 1972



SAN FRANCISCO DEPARTMENT OF CITY PLANNING

HAIGHT STREET
SHOPPING AREA

A Background Study prepared by the Department of City Planning

November 1972

SUMMARY

The purpose of this report is to determine the potential for commercial development along Haight Street. The report is divided into three sections. The first section provides background information and examines certain trends and basic factors which have a general bearing on the future development of the street. The second section discusses the results of a market study undertaken to determine the demand potential of the small trade area which now accounts for the majority of retail goods and services sold along Haight Street. The third section deals with development opportunities and suggests several improvement actions to help businesses realize the market potential within the present primary trade area. It also explores the possibility of attracting substantial additional support from a larger area.

Background

1. The population of the Haight-Ashbury declined by 10 percent between 1950 and 1970. During this same period, the racial composition of the population shifted from 97 percent white to 57 percent white and the number of families was sharply reduced. Incomes in the Haight-Ashbury grew slowly and are now well below the citywide average.

2. The level of business activity appears to have remained fairly stable through the mid-1960s. The spread of hard drug use and the rapid increase in crime that marked the end of the 'hippie' era in 1967-68 led to a severe business decline. The number of vacant stores on Haight Street climbed from 4 percent in 1965 to 35 percent in 1971.

3. There have been some encouraging signs of recent recovery. The crime rate for major crimes has fallen sharply to a level that is now below the citywide average, many new businesses have appeared, and the shopping environment is noticeably more pleasant than it was a year ago.

4. The recovery is far from complete, however. The present retailing pattern is still characterized by a limited range of shopping opportunities. The six block length of the commercial strip creates convenience and accessibility problems for shoppers and tends to isolate some of the small stores which need to be centrally located. The vacancy rate still exceeds 20 percent.

5. Future prospects for business growth are influenced by the costs of making physical improvements in the stores and buildings which line Haight Street. A building conditions survey conducted in June, 1972 found the buildings to be basically sound and the cost of rehabilitation to be within feasible ranges.

The Market Study

1. Based on 1971 sales, drugstores, appliances, and miscellaneous retail stores were the only store types to achieve the sales levels expected for a healthy business. Sales were inadequate for building materials, food stores, eating and drinking, liquor, personal services, and apparel. There were no general merchandise or furniture stores on Haight Street during 1971.

2. The potential for future support of stores selling retail goods and services along Haight Street must also be considered. Estimates of this potential are based on the assumption that Haight Street will continue to draw largely from its present primary trade area.

3. The primary trade area -- the area that provides the bulk of commercial support -- was identified by means of a survey of over 1,000 shoppers. It is bounded by Stanyan-Oak-Baker-Buena Vista Park-Frederick and is within walking distance of Haight Street.

4. The buying power of the people living within the primary trade area and the proportion of their buying power "captured" by Haight Street during 1971 is estimated for various kinds of stores. This is then compared to the share of the market that might be captured if Haight Street is able to offer an attractive physical environment, an adequate selection of goods and services at competitive prices, and a convenient and accessible arrangement of stores.

5. Only building materials, liquor, and appliances appear to realize the market potential of the area. Opportunities seem to exist for significant increases in sales for all other groups. Based on the sales levels suggested by the market potential, it is estimated that three and one-half blocks of retail floor space could be supported. Appropriate alternative uses would have to be found for the remaining two and one-half blocks.

Development Opportunities

1. A number of improvement actions are needed to attract the demand which will support even three and one-half blocks of retail activity. Consolidation of most neighborhood-oriented stores into a three block area could improve shopper convenience and increase sales. The cumulative attraction derived from grouping a wide variety of stores could be particularly beneficial to small commercial uses which face intense competition or serve highly limited markets.

2. Street beautification would help spur business. A number of specific beautification measures are suggested in order to illustrate the kinds of possibilities that exist. An effective beautification program will require input from both the private and public sectors.

3. Financial and technical assistance is needed to strengthen business activity on Haight Street. Lending institutions should reassess their activities in the area since there appears to be some difficulty in obtaining commercial loans. Technical assistance is required in packaging loan requests. There could be an active outreach program offering other forms of business counselling to merchants on the street.

4. Haight Street should also function as a community center which serves the social, cultural, and recreational needs of the neighborhood as well as its shopping needs. This would strengthen the street's role as a source of community identity. In addition, an expanded range of community uses would occupy vacant commercial frontage and thus complement the consolidation of retail stores.

5. Haight Street may be able to function as more than a neighborhood shopping center serving the needs of the present primary trade area. If it can draw substantial additional support from other areas, the resultant increase in sales could justify more than the three and one-half blocks of retail floor space suggested by the market study.

6. Significant penetration of the market between Frederick and Seventeenth Street may be possible. Environmental improvements, increased accessibility, and a better tenant mix are the key needs. Additional off-street parking could be important. The attraction of shoppers from this area would probably require more extensive improvements than the attraction of shoppers from the primary trade area.

7. Haight Street may also have the potential to draw greater commercial support from outside of the Haight-Ashbury. Its location next to Golden Gate Park, the presence of several large medical and educational institutions, the proximity to other densely populated neighborhoods, and the nearness to major traffic routes create markets that have yet to be tapped. It may be possible to reach these markets through one or more large "anchor" tenants, the cumulative attraction of a number of small specialty shops, or a combination of the two.

8. A broad scope of changes is needed on Haight Street. Perhaps the first step is to establish some basic agreement on whether Haight Street should be oriented primarily toward the present Oak to Frederick trade area, attempt to serve the Frederick to Seventeenth Street population as well, or appeal

to a larger region outside of the neighborhood. Successful implementation of any comprehensive improvement program will require the participation of merchants, property owners, realtors, lenders, the City, and community residents.

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I. INTRODUCTION

This report is the fourth in a series prepared by the San Francisco Department of City Planning as part of an Area Plan for the Haight-Ashbury neighborhood. Previous publications include a brief history of the area and background studies on transportation and housing. Unlike past reports, the commerce study does not attempt to comprehensively treat all of the major neighborhood issues falling within its subject field. For example, there are six commercial zones in the Haight-Ashbury and 208 buildings devoted at least partially to commercial use. The principal focus of this report will be on the six blocks of Haight Street -- Central to Stanyan -- which account for roughly one-half of the commercial buildings in the neighborhood.

The decision to concentrate on Haight Street was based on three factors: 1) it is clearly the major commercial zone in the neighborhood; 2) limited City Planning Department staff time could best be utilized in doing an in-depth analysis of one area rather than giving more cursory attention to the full range of commercial activities throughout the Haight-Ashbury; and 3) Haight Street occupies a position of community importance that goes beyond its function as a shopping center.

Haight Street is a major focal point for public attention. People from outside of the neighborhood -- visitors, investors, many public officials, interested citizens -- often view the entire Haight-Ashbury in terms of what is happening on Haight Street. For residents of the neighborhood, the street has the potential to meet not only their daily shopping needs but certain social, cultural and recreational requirements as well. Thus, Haight Street plays an important role in giving an identity to the larger community. The broader concept of the street's community function is not fully dealt with in this report, however. The noncommercial possibilities along Haight Street are discussed generally and at a conceptual level. They will be treated in further detail as a part of the Haight-Ashbury Community Facilities report now being prepared.

It is important to realize that the commercial viability of the street is the most basic element underlying its ability to adequately perform the larger role of community center. The primary focus of the present report is on the potential of Haight Street as a marketing place for retail goods and services. The study examines a number of recent trends such as population size and composition, income levels, shoppers' attitudes toward the street, the mix of retail goods and services offered, number of vacancies, and overall level of commercial activity. A building conditions survey was conducted by a senior inspector from the Bureau of Building

Inspection to determine the cost and feasibility of rehabilitation. Twenty percent of the 99 commercial buildings on Haight Street were inspected. A market analysis was undertaken to define present and potential trade areas (i.e., where the majority of shoppers reside) and to estimate the buying power and expenditure patterns of residents within these trade areas as well as the percentage of their total purchases "captured" by Haight Street. From this, it becomes possible to suggest the kinds of businesses and amount of commercial space that can be supported. The overall purpose of the analysis is to determine realistic future development alternatives for Haight Street: the various directions in which it can move, the implications of change, and the implementation measures required to reach the goals decided upon.

II. BACKGROUND

Neighborhood Population and Income Changes

The Haight-Ashbury has undergone significant change during recent years. Total population in the area bounded by Stanyan-Fulton-Baker-Buena Vista Park-Seventeenth Street declined by 10 percent from 22,380 in 1950 to 20,080 in 1970. During this same period, the racial composition shifted dramatically from an overwhelming majority of whites (97 percent in 1950) to a substantial proportion of blacks and other nonwhites (43 percent in 1970). In addition, the population has become younger and the number of families has declined markedly in proportion to the number of unrelated individuals.

Although these developments affect basic demand for retail goods and services, the single most important determinant is the level of income. In this regard, median family income expressed in real terms (discounting differences due to inflation) went up 5.3 percent between 1960 and 1970 to $8,200 in comparison with a citywide increase of 18.5 percent to $10,503. While income trends for unrelated individuals cannot be determined due to the unavailability of information for 1960, average income for this group in 1970 was $4,462 compared to $5,354 citywide. It is clear, then, that incomes in the Haight-Ashbury are low and that the trend appears to be in the direction of a widening gap between area residents and the citywide average.

POPULATION AND INCOME CHARACTERISTICS IN THE HAIGHT-ASHBURY

	1950	1960	1970
Population	22,387	21,519	20,080
White	97%	75%	57%
Black	2%	17%	33%
Other	1%	8%	10%
Age			
0-14	15%	21%	18%
15-34	32%	31%	44%
35-over	53%	48%	38%
Median Family Income	--	$7,788	$8,200

Source: United States Census

Business Trends

Business levels and the mix of goods and services offered along Haight Street have also shifted during this period. A significant drop in the overall level of business activity is evident from the increase in the number of vacant stores from 4 percent in 1965 to 35 percent in 1971. In addition, the importance of convenience items has grown in relation to shopping goods and services. Convenience items tend to be those which are more rapidly used and frequently purchased by the local population (food, drugs, certain basic services such as laundromats and beauty salons), whereas shopping items are relatively expensive, durable, and less frequently purchased (apparel, shoes, furniture). Shopping goods and services are generally subject to more intense competition and require a larger trade area with greater purchasing power. Thus, the recomposition of store types that has occurred reflects the inability of businesses along Haight Street to attract customers from as wide an area as previously. By and large, merchants have had to rely on a far smaller trade area to obtain the patronage necessary for their basic support.

Several factors underlie this general downturn in business activity. Low incomes and a shrinking population within the Haight-Ashbury have diminished purchasing power. Haight Street has also suffered (as have neighborhood shopping areas throughout the nation) from the competition of more modern retailing centers offering convenient off-street parking, a compact arrangement of easily accessible stores, and wide selection at low prices. However, the accelerated commercial decline of the late 1960s was caused largely by the severe physical and social blight that accompanied the rapid spread of hard drug use in the Haight and the abrupt termination of the "hippie" era. Crime in the area, particularly in the flatlands around Haight Street, soared to unprecedented levels.

A survey of over 200 neighborhood residents conducted by the City Planning Department in the fall of 1971 clearly demonstrates the adverse effect of these developments on shopper attitudes toward the street (Appendix I). A substantial majority of those surveyed shopped on Haight Street less in 1971 than previously. The reasons most frequently given were, in order 1) people on the street -- specifically, panhandlers, loiterers and drug addicts; 2) street litter and poorly maintained buildings; and 3) inadequate stores offering a limited selection of goods and services which are often overpriced and of low quality. The two most common complaints thus dealt with perceived shortcomings in the social and physical environment.

COMMERCIAL ESTABLISHMENTS ON HAIGHT STREET: 1955 TO 1972

	1955 No.	1955 %	1965 No.	1965 %	1969 No.	1969 %	1971 No.	1971 %	1972 No.	1972 %
Convenience Goods and Services	82	48%	83	52%	67	41%	63	38%	64	39%
Building materials	5	3	6	4	6	4	7	4	6	4
Food stores	23	13	17	11	11	7	10	6	11	7
Eating & drinking	25	15	29	18	26	16	27	16	28	17
Drugstores	4	2	4	3	3	2	2	1	1	.5
Personal services	25	15	27	17	21	13	17	10	18	11
Shopping Goods and Services	60	35	50	32	35	21	26	16	40	24
Gen. merchandise	5	3	4	3	-	-	-	-	1	.5
Apparel stores	13	8	11	7	6	4	4	2	5	3
Furniture and appliances	6	3	6	4	1	.5	3	2	3	2
Misc. retail	33	19	25	16	27	16	17	11	28	17
Misc. repair services	3	2	4	3	1	.5	2	1	3	2
Other	16	9	20	13	13	8	19	12	21	13
Vacant	14	8	7	4	49	30	57	35	40	24
TOTAL[1]	172		160		164		165		165	

[1]Variations in total number of commercial establishments is attributable to the demolition of a limited number of storefronts between 1955-1965 and the consolidation or subdivision of certain other storefronts. Percentage breakdown will not always total 100 percent due to rounding.

Source: Polk City Directory for 1955, 1965, 1969, and 1971; Department of City Planning for 1972.

Recent Recovery

There have been some encouraging signs of recovery, however. The number of major crimes reported has declined at a substantially greater rate within the Haight-Ashbury than for San Francisco as a whole since 1968. Crime in the area immediately surrounding Haight Street (Stanyan-Oak-Baker-Frederick) declined by 68 percent during this period. The crime rate for major crimes in the Haight-Ashbury, expressed as the number of crimes per 1,000 population, is now below the citywide average.

MAJOR CRIMES REPORTED
JANUARY THROUGH SEPTEMBER
SELECTED YEARS[1]

	1968	1970	1972	Net Change 1968-1972	Crimes per 1,000 Pop. 1972
Haight-Ashbury					
Stanyan-Frederick-Buena Vista Park-Seventeenth Street	351	271	212	-40%	37.5
Stanyan-Oak-Baker-Frederick	1,704	1,009	552	-68%	59.1
Stanyan-Fulton-Baker-Fell	479	502	315	-34%	61.6
San Francisco	58,670	56,686	46,670	-21%	65.2

[1]Major crimes include homicide, rape, robbery, assault and battery, burglary, and theft.

Source: Department of City Planning computations based on information supplied by San Francisco Police Department.

A number of other developments beneficial to business activity have occurred during 1972. Many stores have been painted or otherwise improved, some are expanding their merchandise, and at least a few have undergone major rehabilitation. The street and the sidewalks appear cleaner. The vacancy rate fell from 35 percent in 1971 to 24 percent in May, 1972, and has remained relatively stable since that time.

The entry of new businesses has been concentrated in the miscellaneous goods category and consists of used furniture and antique shops (which account for over half of the new stores in this category), several crafts shops, a photographic supply store, a book store, and one or two others. A medium-sized furniture store and general merchandise store have also opened during 1972 and should be able to draw customers from a larger market area. Many of the major tenants continue to locate along the three blocks nearest the Haight-Masonic intersection (Central to Clayton). This concentration of a variety of compatible and complementary uses improves selection and adds to shopper convenience and the cumulative attraction of the area. At present, it forms the core of the commercial zone.

Present Retailing Pattern

The retailing system along Haight Street is still characterized by a limited range of shopping opportunities. Despite the recent addition of some new stores, the selection of general merchandise items, apparel, furniture, and appliances is not comparable to major competing centers. Food, eating and drinking, and personal service-type establishments predominate, although the results of the residents survey indicate that even these stores fail to meet neighborhood needs in terms of selection, quality and price. Many smaller uses which require the shopper attraction of a prime tenant or concentration of other stores remain isolated and poorly located along the street. The vacancy rate, which is high overall, and the number of marginal stores reach serious proportions on some blocks. The length of the strip (six blocks) creates accessibility problems as does the shortage of off-street parking.

Location

The central location of the Haight-Ashbury is both an advantage and a disadvantage. It exercises a negative influence to the extent that it inhibits the growth of neighborhood-oriented stores selling items which must compete directly with downtown or other large retailers located nearby. On the other hand, the central location of the neighborhood could be supportive of commercial activities which have the ability to draw customers from a wide area. Potential support of this kind is strengthened by the fact that shopping patterns tend to follow traffic patterns. The Haight is located alongside or in close proximity to the Sunset-Downtown transportation corridor as well as the Stanyan and Masonic crosstown routes. In addition, the presence of Golden Gate Park creates considerable untapped demand. The University of California Medical Center and other major institutions in the vicinity, and the

dense population of the Haight-Ashbury and immediately surrounding communities are also real or potential markets. It seems clear that the existing pattern of commercial development along Haight Street fails to take full advantage of the area's generally favorable location.

Building Conditions

Many of the respondents to the residents survey discussed previously cite poorly maintained buildings as an element of the physical blight that discourages them from shopping on Haight Street. The actual condition of these buildings has long been a matter of concern and some disagreement. Rumors of large-scale demolition and new construction have often circulated and have been opposed by those favoring rehabilitation of the building stock.

In June, 1972, a building conditions survey was conducted along the six block Haight Street commercial strip with the assistance of the Bureau of Building Inspection to ascertain repair costs related to 1) basic code compliance, 2) exterior and interior painting, and 3) storefront modernization. Twenty-one of the ninety-nine buildings on the street were inspected. Eleven were commercial structures with no residences above and ten were mixed residential/commercial uses. In all, 32 stores and 67 dwelling units were included. This compares to the 165 stores and 335 dwelling units on the street -- a sample of roughly 20 percent.

Estimates of the cost of repair were made for each building inspected. Cost estimates were also broken down by store and by dwelling unit. The estimated cost of repair per store was below $1,000 in fourteen of the buildings (67 percent of the total surveyed) and over $2,000 in only three of the buildings. The repair cost estimate per dwelling unit was under $500 in 80 percent of the mixed use buildings inspected. Average costs per dwelling unit for the street as a whole would probably be higher than is indicated by the survey results. This is due to the fact that the majority of the dwelling units inspected were concentrated in a few large buildings where economies of scale could be realized in making the necessary repairs. Cost estimates per building cover a much larger range due to wide variations in the size of the buildings. The amounts estimated separately for stores and dwelling units give a better indication of the financial feasibility of rehabilitation for this reason.

Separate cost estimates for stores and dwelling units do not include exterior painting costs, however. This additional amount is reflected only in the total cost per building. The largest single cost item overall was, in fact, exterior

ESTIMATED COSTS OF BUILDING REHABILITATION
HAIGHT STREET: CENTRAL TO STANYAN

Estimated Costs per Store[1]

Category	Number of Buildings
0-$1,000	14
$1,000-$2,000	4
Over $2,000	3

Estimated Costs per Dwelling Unit[2]

Category	Number of Buildings
0- $500	8
$500-$2,000	1
Over $2,000	1

Estimated Costs per Building[3]

Category	Number of Buildings
0- $1,000	9
$1,000- $2,500	5
$2,500- $5,000	2
$5,000-$10,000	3
Over $10,000	2

[1]Estimates include costs related to code compliance work and storefront modernization.

[2]Estimates include costs related to code compliance work only.

[3]Estimates include costs related to code compliance work, storefront modernization, and painting.

Source: Building Survey and cost estimates prepared by Department of City Planning and Bureau of Building Inspection. Survey conducted in June, 1972.

painting, which represented 26 percent of the estimated total cost. Storefront modernization (metal doors and door jambs, plate glass, new facades, etc.) accounted for another 25 percent of the cost estimates. Code required improvements were distributed evenly over a number of items and absorbed the remaining 49 percent of the total. There were virtually no foundation problems in the buildings inspected. A copy of the inspection form used in the building conditions survey is attached as Appendix II.

The total estimated cost of repair for the 21 buildings was just under $85,000. Based on this sample, and correcting for probable low estimates related to dwelling units, the cost of code compliance, painting, and storefront modernization for the entire 99 buildings on the street would probably range between $500,000 and $600,000. These figures could go substantially higher, however, since the costs associated with the modernization of store interiors, business expansion, and other general improvements (both commercial and residential) that are frequently made in addition to code-required work have not been included. There is also the added uncertainty created in commercial rehabilitation which stems from the fact that the cost and extent of physical improvements may vary greatly according to the nature of the commercial use. Laundries, for example, require heavy plumbing and special flooring whereas a dry goods store can get by on far less. Nevertheless, the estimates derived from the survey clearly establish the feasibility of rehabilitation and should dispel any notion that large-scale demolition and new construction must necessarily precede a commercial rejuvenation.

III. THE MARKET STUDY

The background features discussed thus far bear on the future potential of Haight Street as a commercial center. In addition, more specific estimates of demand for retail goods and services sold along the street need to be made. A market study was completed by the City Planning Department for this purpose. Basically, the market study analyzes recent sales of retail goods and services along the street and compares this to estimates of the amount and kinds of business that could be supported in the future.

Present Business Performance

The most recent period for which reliable and relatively complete sales information is available is 1971. The decline in the number of vacant storefronts since that time has probably resulted in an overall increase in sales during 1972. Comments received from various merchants suggest, however, that significant increases in sales have been limited to relatively few stores and that many of the businesses on the street are operating at marginal levels. 1971 sales are thus considered to provide an accurate indicator of present business conditions.

For purposes of comparison, sales levels are expressed in terms of annual dollar sales per square foot and are shown for twelve different commercial use categories. The 1971 sales experiences of various businesses along Haight Street are then viewed in relation to stable sales ranges. These stable sales ranges indicate the level of sales which normally should be achieved for a healthy business. This comparison between actual sales and the stable sales ranges provides an indication of which stores are prospering and which are not. The sales levels that should be achieved vary among separate categories of commercial use. Only drugstores, appliances, and miscellaneous retail stores appear to have achieved viable sales levels during 1971. Drugstores actually exceeded the stable range slightly. Sales were inadequate for six, and perhaps seven, of the remaining store types. (Sufficient sales information is unavailable for miscellaneous repair services.) Personal service establishments and apparel stores were particularly low on the basis of the comparison between actual sales and stable sales. There were no general merchandise or furniture stores on the street in 1971.

Market Potential

The future of Haight Street as a commercial center cannot be determined on the basis of current sales information alone. A primary factor that must be considered is the "market potential" for goods and services sold along Haight Street.

HAIGHT STREET COMMERCIAL AREA
ESTIMATED SALES PER SQUARE FOOT, 1971

	Haight Street[1]	Normally Stable Sales Range[2]
Convenience Goods and Services		
Building Materials	$26	$30-40
Food Stores	$65	$75-85
Eating & Drinking	$29	$35-50
Liquor	$84	$90-110
Drugstores	$79	$60-75
Personal Services	$14	$30-40
Shopping Goods and Services		
General Merchandise	--	$30-40
Apparel Stores	$22	$40-50
Furniture	--	$25-35
Appliances	$64	$55-75
Misc. Retail Stores	$43	$35-50
Misc. Repair Services	Insufficient information	$30-40

Source: [1]Department of City Planning computation based on 1971 sales information obtained from San Francisco Tax Collector and California State Board of Equalization.

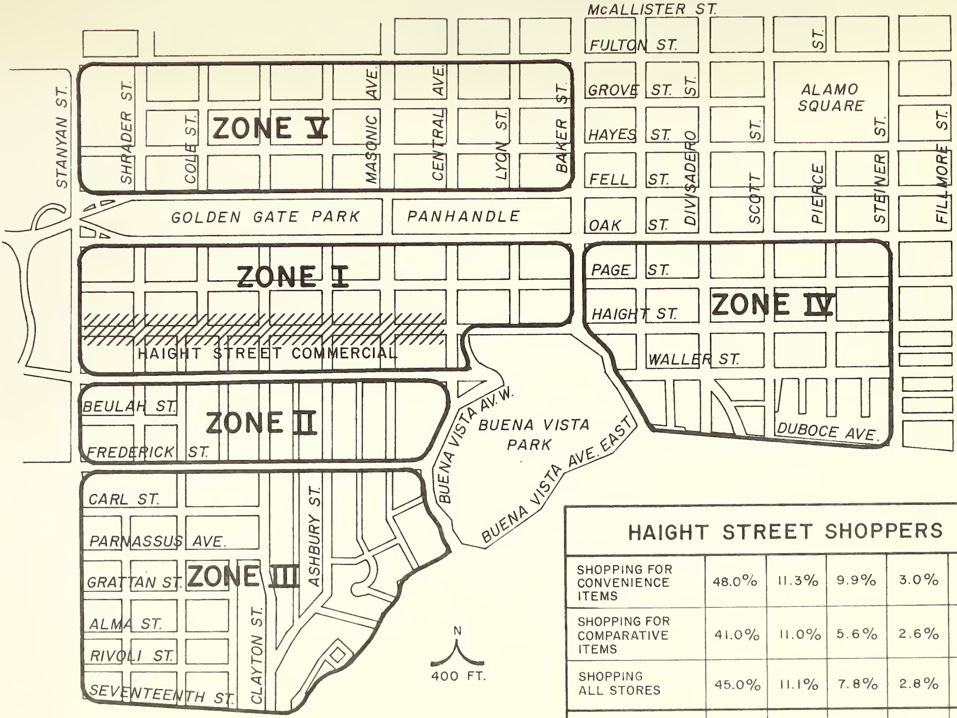
[2]Department of City Planning estimates based on Urban Land Institute "Dollars and Cents of Shopping Centers" and discussions with local marketing specialists.

The market potential is the amount of sales which could be realized as a result of the demand generated by the population to be served. This has been estimated through a process of: 1) defining the present and potential trade areas for businesses on the street; 2) analyzing the buying power and expenditure patterns of the populations residing within these trade areas; and 3) discussing the implications of this demand in terms of the amount of commercial space and kinds of businesses that could be supported if Haight Street captured its market potential.

Trade Areas

The trade area for any retail center is that area which provides the bulk of the continuing patronage necessary for steady commercial support. The size of the trade area is defined by such things as the kinds of businesses operating in the retail center, the general convenience and accessibility provided shoppers, the nature and location of competition, and the quality of the physical and social environment. In the case of Haight Street, trade areas were determined by means of a shoppers survey conducted in June, 1972. The survey included 22 stores -- 12 of which sold convenience items and 10 of which sold comparative shopping items. Customers were asked to list the street intersection nearest their home and to note whether they relied on public transit, walked, or drove a car to reach the store in which they were shopping. Information was obtained from over 1,000 shoppers.

The survey findings indicate trade areas of very limited size. Over 45 percent of the people surveyed live between Waller, Stanyan, Oak, and Baker (Zone I -- population 6,251). The area between Waller and Frederick (Zone II -- population 3,079) accounts for another 11 percent. These are the significant concentrations of present commercial support for Haight Street. The number of shoppers coming from the Upper Ashbury (Zone III -- population 5,642) is surprisingly low considering its proximity to Haight Street and population size. There is a more abrupt drop in patronage from the areas east of Baker (Zone IV -- population 5,576) and north of the Panhandle (Zone V -- population 5,108). The size of the primary trade area (Zones I and II) is thus defined largely by walking distances -- a fact borne out by a further survey finding that 69 percent of the people shopping on Haight Street walk there. Once in their cars, residents of the Haight-Ashbury apparently prefer to shop in some other area.



HAIGHT STREET TRADE AREAS

HAIGHT STREET SHOPPERS					
SHOPPING FOR CONVENIENCE ITEMS	48.0%	11.3%	9.9%	3.0%	4.5%
SHOPPING FOR COMPARATIVE ITEMS	41.0%	11.0%	5.6%	2.6%	3.7%
SHOPPING ALL STORES	45.0%	11.1%	7.8%	2.8%	4.2%
LIVE IN ZONE	I	II	III	IV	V

HOW SHOPPERS REACH HAIGHT STREET

Walk	Drive	Public Transit	Bicycle
69%	22%	6%	3%

Source: San Francisco Department of City Planning survey conducted in June, 1972.

Reliance on the automobile undoubtedly helps explain why so few people living in the Upper Ashbury shop on Haight Street. Due both to distance and hilly terrain, travel to Haight Street often requires the use of a car. Walk-in shopping within this area is directed far more toward Cole Street and a few other conveniently located stores. Haight Street shopping from within the areas north of the Panhandle and east of Baker is also hampered by the fact that neither area is within easy walking distance (normally defined as two blocks for shopping purposes). The particularly low level of commercial support generated between Fell and Fulton suggests that the Panhandle and the heavy traffic on Oak and Fell form a major additional barrier. The position of Baker as the eastern boundary of the primary trade area is consistent with its location at the top of a steep hill (discouraging walk-in shopping) and the presence of competing stores in the vicinity of Divisadero Street and other locations nearby.

Of the three zones outside of the primary trade area, the Upper Ashbury may be expected to continue as the most important source of demand for retail goods and services sold on Haight Street. It presently provides more commercial support than the other two zones combined and appears to hold greater potential for future increases in demand as well. This is partly because the Upper Ashbury faces no physical barriers comparable to the traffic on Oak and Fell and partly because there is not the same easy access to competing centers such as exists for people living east of Baker. Perhaps for these reasons, there also seems to be a stronger sense of community identification with Haight Street in the Frederick to Seventeenth Street area.

Buying Power Within the Trade Areas

The potential for commercial development on Haight Street is determined not only by the size of the area it serves but by the buying power and spending patterns of the trade area population as well. Estimates of buying power -- the total amount of money spent in stores selling retail goods and services -- have been made for Zones I, II, and III. Estimates have also been made of the kinds of goods and services purchased and the amount of total buying power captured by Haight

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[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

HAIGHT STREET COMMERCIAL AREA
ESTIMATED SHARE OF AVAILABLE EXPENDITURES FOR RETAIL GOODS AND SERVICES, 1971

Expenditure Item	ZONE I -- Oak-Waller			ZONE II -- Waller-Frederick			ZONE III-- Frederick-17th St.		
	Est.Buy. Power ($1,000)	Est.Purch. Haight St. ($1,000)	Capture Rate (%)	Est.Buy. Power ($1,000)	Est.Purch. Haight St. ($1,000)	Capture Rate (%)	Est.Buy. Power ($1,000)	Est.Purch. Haight St. ($1,000)	Capture Rate (%)
Convenience Goods and Services									
Bldg. Materials	300	193	64	155	46	30	325	26	8
Food Stores	2,682	1,421	53	1,355	332	25	2,761	194	7
Eating & Drinking	1,100	590	54	561	139	25	1,166	81	7
Liquor	262	202	77	135	65	48	265	22	8
Drugstores	463	196	42	242	44	18	508	26	5
Personal Services	456	189	41	227	44	19	470	26	6
Shopping Goods and Services									
General Mdse.[1]	469	--	--	239	--	--	493	--	-
Apparel Stores	688	88	13	358	23	6	767	9	1
Furniture	321	--	--	172	--	--	353	--	-
Appliances	223	88	39	119	23	19	246	9	4
Misc. Retail	531	108	20	283	29	10	564	10	2
Misc. Repair Serv.	144	Insufficient Info.		76	Insufficient Info.		160	Insufficient Info.	

[1]Estimated buying power for general merchandise does not include Department Store and Junior Department Store purchases.

Source: Department of City Planning. Estimated buying power based on pattern of retail sales in the San Francisco-Oakland and San Jose Standard Metropolitan Statistical Areas reported by Bureau of the Census and adjusted for per capita income differences in the Haight-Ashbury. Estimated purchases on Haight Street based on percentage of 1971 sales going to each of the three zones indicated by shoppers survey conducted in June, 1972.

Street from within these three zones during 1971. Zones IV and V have not been included in this analysis since they are not expected to provide significant market support for Haight Street in the future.

As expected, convenience goods and services capture a much larger share of the market than do comparative shopping goods and services. This is normal, since the principal attraction of neighborhood shopping centers is often the convenience they are able to offer residents of the immediate area. The bulk of the shopping is usually for items which are frequently purchased and less expensive. Comparative shopping goods and services are generally more costly, less frequently purchased, and thus subject to greater competition.

The amount of buying power captured by Haight Street varies considerably between the three zones. Residents of Zone I clearly rely heavily on Haight Street whereas residents of Zone III rarely shop there. Capture rates in Zone II are roughly one-half those in Zone I. This is partially due to the fact that many of the people living between Waller and Frederick enjoy easy access to competing commercial establishments on Cole Street. The hilly terrain which characterizes this area also discourages walk-in shopping and thus tends to further reduce capture rates below the levels experienced in the Oak to Waller area.

<u>Potential Share of the Market</u>

The amount of buying power presently captured by Haight Street is considerably below estimates of the amount that could potentially be captured for most commercial use categories. These estimates are based on the assumption that Haight Street will continue to function primarily as a neighborhood convenience center serving the shopping needs of the population in Zones I and II. It should be noted, however, that realization of this market potential will require improvements in the physical environment, an adequate selection of goods and services, competitive prices, and a more convenient and accessible arrangement of stores along the street.

Reliable estimates of the share of the market that could potentially be captured by Haight Street are only made for Zones I and II. The impact of any Haight Street improvements on shopping patterns within Zone III is more difficult to predict due to the fact that the area is beyond walking distance, subject to more intense competition from a number of other shopping areas, and less reliant on Haight Street for the satisfaction of basic shopping needs. It has been assumed that Zone III will continue to account for the same overall percentage of sales on Haight Street as in 1971 regardless of the amount of the increase in total sales.

ESTIMATED SHARE OF RESIDENT BUYING POWER
CAPTURED BY HAIGHT STREET
(Percent)

	Zone I--Oak-Waller		Zone II--Waller-Frederick	
	1971	Potential	1971	Potential
Convenience Goods and Services				
Building Materials	64	65	30	30
Food Stores	53	80	25	40
Eating & Drinking	54	75	25	35
Liquor	77	80	48	50
Drugstores	42	70	18	35
Personal Services	41	70	19	30
Shopping Goods and Services				
General Merchandise	--	25	--	15
Apparel Stores	13	20	6	10
Furniture	--	20	--	10
Appliances	39	40	19	20
Misc. Retail Stores	20	35	10	20
Misc. Repair Services	Insufficient information	50	Insufficient information	25

Source: Department of City Planning estimates based on discussions with marketing specialists.

Based on 1971 sales, only building materials, liquor, and appliances seem to realize the market potential of the area. The capture rates experienced for food stores, eating and drinking, drugstores, personal services, apparel, and miscellaneous retail stores suggest that there could be significant increases in sales for these categories. Although there were no general merchandise or furniture stores during 1971, it is estimated that Haight Street could capture up to 25 percent of the buying power in Zone I and 15 percent of the buying power in Zone II for general merchandise while capturing 20 percent of the buying power in Zone I and 10 percent of the buying power in Zone II for furniture. The general merchandise estimate reflects the judgment that a variety store or other store selling miscellaneous general merchandise items could be supported along Haight Street, whereas a full-line department store or junior department store could not.

Size of the Haight Street Commercial Area

The implications of these potential increases in sales can be translated into commercial space requirements. Comparisons have been drawn between three sets of figures: 1) the amount of retail floor space actually in use during 1971, 2) the amount of retail floor space justified by 1971 sales, and 3) the amount of retail floor space justified at the sales levels that would prevail if the market potential were fully realized.

It appears that sales in 1971 were sufficient to adequately support only two blocks of retail space (99,900 square feet) whereas there were three blocks (147,700 square feet) actually occupied. The market potential suggests that three and one-half blocks (161,400 square feet) could be supported. Over 75 percent of the retail space suggested by the market potential of the area is for convenience goods and services. Nevertheless, stores selling convenience items would occupy proportionately less space in relation to other stores selling comparative shopping items than was the case in 1971. The floor space devoted to convenience goods and services would increase by 5 percent over the amount occupied in 1971, while that devoted to comparative shopping goods and services would increase by 50 percent. Thus, although Haight Street would continue to function primarily as a neighborhood convenience center, the market potential suggests there should be a wider range of stores than there was in 1971.

The rearrangement of store types that apparently can occur would require an expansion of some commercial uses and contraction of others. More space would be required for food, drugs, general merchandise, furniture, and miscellaneous repair services. There would be less space devoted to building materials, eating and drinking, liquor, personal services, apparel, appliances, and miscellaneous retail stores.

IMPLICATIONS OF MARKET STUDY
FOR HAIGHT STREET RETAIL FLOOR SPACE
(Thousands of Square Feet)

	1971 Existing Floor Space	Floor Space Justified by 1971 Sales	Floor Space Justified by Market Potential[1]
Convenience Goods and Services	(120.9)	(87.3)	(126.6)
Building Materials	12.9	11.2	11.2
Food Stores	40.1	31.0	50.7
Eating & Drinking	35.2	24.9	34.9
Liquor	7.7	5.5	5.5
Drugstores	4.3	5.1	8.6
Personal Services	20.7	9.6	15.7
Shopping Goods and Services	(22.9)	(12.6)	(34.8)
General merchandise	--	--	6.9
Apparel Stores	8.0	4.0	6.3
Furniture	--	--	4.5
Appliances	4.0	3.3	3.3
Misc. Retail Stores[2]	13.2	5.3	9.4
Misc. Repair Services	1.6	Insufficient Information	
SUB-TOTAL	147.7	99.9	161.4
Non-Retail	45.2	N.A.[3]	N.A.[3]
Vacant	76.4	--	--
TOTAL	269.3	99.9	161.4

[1]Assumes that Haight Street will have the same percentage of total sales from outside of the Oak-Frederick primary trade area (Zone I and Zone II) as in 1971. Potential sales within Zones I and II are based on previously presented estimates of the percentage of total buying power that could be captured along Haight Street.

[2]During 1971, 3.9 thousand square feet of retail floor space were devoted to tax-exempt activities for which no sales information is available. The figure shown for Misc. Retail Stores in the column titled "Floor Space Justified by 1971 Sales" is somewhat low for this reason.

[3]Not applicable. The amount of space devoted to non-retail uses cannot be determined on the basis of retail sales information.

Source: Department of City Planning estimates.

Even if the total amount of retail floor space suggested by the market potential were fully occupied, there would remain an additional 107,900 square feet of commercial space on the street. An appropriate use for this space must ultimately be determined. In 1971, 76,400 square feet remained vacant and another 45,200 square feet were devoted to such nonretail uses as medical offices, real estate offices, a bowling alley, community service facilities, and several wholesale activities.

Again, the foregoing estimates are based on the assumption that Haight Street will continue to be primarily a neighborhood convenience center. There may be other development possibilities, however, which would alter the amount and nature of the demand for goods and services sold along the street. The following section of this report examines the changes required to improve Haight Street as a neighborhood convenience center and explores the basic features and potential for developing a more diversified commercial area.

IV. DEVELOPMENT OPPORTUNITIES

Neighborhood Convenience Center

The potential for Haight Street as a neighborhood convenience center serving the needs of a small primary trade area has been described in some detail. It is estimated that three-and-one-half blocks is the maximum amount of retail space that could be supported in such a center. If this estimate is correct, there remain two-and-one-half blocks of excess space to be devoted to other uses. A number of improvement actions would be required to attract the demand needed to support even this level of retail activity, however,

Consolidation

One important step would be to consolidate the bulk of neighborhood-oriented activities into a single compact commercial node of perhaps three blocks in length. The logical place for this concentration to occur is between Masonic and Clayton with partial block extensions to the east of Masonic and to the west of Clayton. One advantage to this location is that the Haight-Masonic intersection is the principal public transit transfer point in the neighborhood and thus offers the only significant opportunity for transfer point shopping along Haight Street. More importantly, many of the stores that are key to a successful neighborhood convenience center are already located along this three block strip. This includes several restaurants and a cluster of other merchants selling items such as hardware, general merchandise, apparel, furniture, appliances, drugs, liquor, and food.

The major advantage of consolidation, as an alternative to having stores scattered throughout the entire length of the six block commercial strip, is that it makes a wide range of activities more accessible to the multi-purpose shopper whether on foot or in a car. By consolidating, individual stores benefit from a cumulative attraction rather than having to rely solely on the drawing power of their own goods and services. This is particularly beneficial to the many small commercial uses which face intense competition or serve limited markets (books and stationery, apparel, shoes, photo supplies, jewelry, etc.). Stores of this type should be centrally located, not isolated, regardless of whether they have a neighborhood orientation or serve a wider area. Given the size and location of Haight Street, the advantages of cumulative attraction should outweigh the problems associated with proximity to competing uses in most cases. At present, there is a basic compatibility among the stores located in the suggested three block node.

Consolidation is normally brought about through a program of public acquisition. In a free market situation, however, it can best occur on the basis of careful tenant selection in filling existing and future vacancies. This would require the active pursuit of Haight Street property owners, merchants, and others who influence the selection of commercial tenants. According to a survey conducted by the Department of City Planning in September 1972, twenty percent of the storefronts in the suggested three block node were either vacant or occupied by the kinds of activities that normally do not appear in a viable retail center. These activities would probably be unable to pay the higher rents that could be expected to attend a commercial rejuvenation along Haight Street.

Street Beautification

Street beautification would be another major improvement action to help spur business. As previously mentioned, street litter and poorly maintained buildings were among the most common complaints listed in a survey of neighborhood residents conducted by the Department of City Planning during the fall of 1971. An effective street beautification program could thus remove what appears to be one of the major obstacles to increased shopping on Haight Street. Such a program should be designed in a manner that will draw on the existing physical assets of the street. These include a favorable location vis-a-vis Golden Gate Park and the hills, an attractive scale, a sense of containment and easy identity, and the many interesting building facades that line the street. Since most of the shopping is done by people who walk rather than drive, an effort should be made to give Haight Street a strong pedestrian orientation.

Joint action on the part of the private and public sectors is required if a street beautification program is to be successful. Any decisions regarding specific features of the program should logically involve representatives from the City, merchants, property owners, and neighborhood residents. An effort should be made to spell out the respective roles of the private and public sectors.

The public input might include:

1. Transit stop improvements -- sidewalk extensions, sign designation, information regarding schedules and routes, bus shelters and benches, general landscaping.

2. Sidewalk cleaning.

3. Parking improvements -- institute diagonal parking on side streets near the intersections with Haight Street and provide adequate off-street parking facilities.

4. Street closures -- close minor side streets at intersections with Haight Street to create small cul-de-sacs for use as pedestrian plazas or landscaped recreation areas.

5. Street lighting -- install square-boxed lighting fixtures to reduce glare yet retain desired levels of brightness.

6. Street benches -- provide more sitting areas along Haight Street.

7. Design assistance -- provide professional design advice to private groups and individuals.

8. Concentration of improvements -- concentrate improvements in locations that will best achieve the consolidation of shopping mentioned earlier.

Private improvements might include:

1. Planter boxes on sidewalks.

2. Awnings.

3. Exterior painting.

4. More frequent display of wares in front of stores.

5. Upgrade store window displays.

6. New store signs.

7. Other forms of storefront moderniation.

8. Allow trees to grow larger.

Financial and Technical Assistance

Various forms of financial and technical assistance are also needed to strengthen business activity on Haight Street. A number of merchants have commented on the need for commercial loans. Many have expressed an inability to obtain financial assistance through conventional lending institutions (primarily banks) or through the Small Business Administration which has a host of programs offering liberalized borrower qualification criteria, lease guarantees, loan guarantees, and low interest rates.

The difficulty in obtaining loans can in part be attributed to the business atmosphere on Haight Street which, during the past five years, has not been viewed by lenders as supportive of loan requests. The high crime rate, physical deterioration,

and vacant stores that characterized the 1968-1971 period created a general lack of confidence in the area and in the ability of prospective borrowers to repay loans. There thus appears to be a need for lenders to reassess their activities in the area in view of the recent improvements that have occurred along Haight Street and with regard to the potential for future growth described in this report.

Lenders also cite the inability of many small businessmen to properly package loan requests as a reason underlying the difficulty experienced in obtaining commercial financing. Loan application procedures often appear complicated. Submission of a financial statement, operating statement, and, for existing enterprises, a balance sheet showing the net worth of the business are required. This may present a major obstacle for merchants who do not have an adequate bookkeeping system or who are unable to identify the market for their particular product and thus project future sales and expenses. Loan packaging, then, is one form of technical assistance needed on Haight Street.

There is also a need for business counselling that covers such basic procedures as merchandise selection and display, handling payroll and tax forms, advertising, and selling. An active outreach program offering assistance of this kind could be sponsored by the banks or some other institution able to provide information regarding available resources.

Haight Street as a Community Center

Haight Street should be viewed as more than a commercial center. Its natural function is that of a "community center" which serves the social, cultural, and recreational needs of the neighborhood as well as its shopping needs. As such, the street should reflect the unique character of the Haight-Ashbury.

The total range of activities, public and private, that relate to the local community should be considered for possible inclusion. The street should cater to the needs and tastes of the large black population in the area. It should do the same for other groups which form a part of the diverse, integrated neighborhood mix. Since a sizable segment of the community is poor, job training and employment activities could be concentrated along Haight Street. Possibilities of other uses include a child care center, welfare office, storefront police station, and neighborhood health facilities. Cultural and recreational needs can be met through activities similar to the Dance Studio at 1621 Haight and the bowling alley near Haight and Stanyan.

The expansion of the community center function of Haight Street would complement the consolidation of retail stores

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previously discussed. Much of the vacant commercial frontage could be occupied by a new range of community uses. A heavy intermixing of retail activities and other community center functions within the same block should be avoided, since this could cause the stores offering retail goods and services to become too spread out.

A further advantage of the community center concept is that it could put Haight Street in a higher priority status as far as public funds and commitments are concerned. An expanded center with multiple functions could improve the stability of the neighborhood by nature of the improvements which would be required.

Finally, if Haight Street were developed as a community center, it would serve to meet other community needs in addition to shopping and therefore would be likely to receive broad base support.

The Market Between Frederick and Seventeenth Street -- Zone III

The assumption thus far has been that Zone III would account for the same proportion of total sales as existed in 1971 as long as Haight Street continues to function primarily as a neighborhood convenience center. Sales attributed to this area may increase at a more rapid rate than the overall increase in sales, however. The share of the market captured by Haight Street in Zone III was extremely low in 1971. And, although there is a heavy shopper reliance on the automobile, Haight Street is still the most conveniently located commercial center of its size. In addition, 77 percent of the respondents to the survey of residents living between Frederick and Seventeenth Street stated that they shop less on Haight Street now than before.

Significant penetration of the market in Zone III would represent a major change in present consumer shopping habits. A principal difference between this zone and the primary trade area (Zones I and II) is that the latter is more of a captive market defined largely by walking distance from Haight Street. As a result, realization of the market potential in Zone III would probably require more substantial improvements on Haight Street than realization of the market potential in the primary trade area.

Environmental improvements, increased accessibility, and a better tenant mix are the key features needed to attract residents of Zone III. The street beautification program previously discussed probably would have to be carried out in large measure. Stores offering improved quality and wider merchandise selection at competitive prices are equally important. A consolidation of retail stores would help increase accessibility. In addition,

expanded off-street parking facilities would probably be a necessity. Although parking has not been a serious problem to date, the increased attraction of shoppers from beyond walking distance could make it so.

The different income and racial composition of the population in Zone III compared to that of the primary trade area is also a factor to consider. In many other areas, significant cultural and income differences have tended to separate groups in their choice of places to shop. The tendency toward segregation could be even stronger if Haight Street is to function as a community center and a source of neighborhood identity since this implies a high degree of social interaction.

On the other hand, the Haight-Ashbury community has long considered its diversity a source of strength rather than weakness. The varied lifestyles and integrated nature of the neighborhood form its basic human character. The attitudes expressed by many and the changes that have occurred on the street during 1972 give reason to believe that Haight Street can prosper as a shopping area and perform its larger community function.

The Market Outside of the Haight-Ashbury

Haight Street may also have the potential to draw substantially more commercial support from areas beyond the immediate neighborhood. Findings of the market study indicate that there was a low level of sales on Haight Street during 1971 which could be attributed to demand generated by people living outside of Zones I, II, and III. Nevertheless, there appear to be several advantages enjoyed by the street which could lead to a significant increase in sales from people in these areas.

One major advantage is the location next to Golden Gate Park. It would seem that the western end of Haight Street and adjacent portions of Stanyan could be made to more effectively serve as an adjunct to the park. The opportunities for developing park-related commercial uses in this area could be significantly enhanced if the vicinity around Kezar parking lot becomes the eastern terminus for the elephant train carrying visitors around Golden Gate Park (an idea mentioned in this Department's Improvement Plan for Recreation and Open Space). In fact, the future development of the entire southeastern corner of the park -- so much in the air at the moment -- could have a major impact on commercial activity along Stanyan and the western portion of Haight Street.

The presence of several large institutions -- particularly the University of California Medical Center -- also creates a potential market for Haight Street. A rejuvenated commercial

sector could provide more of the goods and services required by the institutions. Should the ability to penetrate this market be developed, some means of improving access between Haight Street and the institutions may be necessary. One approach might be a special shuttle bus service.

Haight Street has other locational advantages. Its central position within the city places it in close proximity to large concentrations of people. The nearness of the Sunset-Downtown transportation corridor and the Stanyan and Masonic crosstown routes is also important since traffic patterns and shopping patterns tend to coincide.

There appear to be two ways in which the market outside of the Haight-Ashbury can be tapped. One is to identify and recruit one or more "anchor" tenants capable of attracting large numbers of shoppers. This, in turn, would provide added support to secondary uses located nearby. No effort has been made in this report to determine the economic feasibility of any single anchor tenant. Suggestions as to the kinds of stores that might be appropriate include a major apparel chain such as THE GAP or Jeans West, a large discount store such as Standard Brands (building materials) or Tower Records, or a food store with unusual drawing power such as the Berkeley Co-op.

A prime location with adequate parking and maximum exposure will be important to any anchor tenant. The western end of Haight Street appears to be the most appropriate spot for several reasons. It is closer to Golden Gate Park and the institutions and is more accessible to some of the other communities likely to be served. Several of the existing buildings are large and offer more efficient floor space. Lot sizes are larger and present better off-street parking opportunities. In addition, displacement is likely to be minimal should new construction be required since vacancy rates are high and there are relatively few mixed use buildings.

The Haight Theater site may offer a particularly unique opportunity for adding to the attraction of Haight Street. One possibility might be something like the Surf Theater which specializes in foreign and American classic films. The theater site includes two other buildings and thus has room for a coffee shop and other supporting activities as well as ample space for off-street parking.

The other way in which Haight Street may be able to draw additional support from outside of the Haight-Ashbury is through the cumulative attraction of a number of small specialty shops. There has been noticeable progress in this direction during the past year with the entry of stores selling antiques, specialty apparel, books, stained glass, photographic supplies, a wide variety of hand-crafted items, soap and body lotions, camping and outdoor equipment, etc. Some of the older merchants have

kept pace by expanding or rearranging their merchandise in order to cater to the special needs and tastes of a larger population. The street has not yet achieved the overall effect needed to draw significant support from a large region, however.

Improvements in the physical environment could be especially important if the merchandising concept adopted for Haight Street is that of a center for specialty items. The street should become a unique physical experience offering a pleasant browsing atmosphere. A better visual-physical link with Golden Gate Park should be established. The Victorian flavor and architectural variety of the older buildings should be preserved and enhanced. And, many of the street beautification measures previously discussed should be undertaken.

Conclusion

The scope of changes needed on Haight Street is too broad to be carried out by private enterprise alone. The public sector must also play a role. In addition, citizen groups can participate by expressing community concern for the types of improvements needed.

First, however, there needs to be some basic agreement on the role Haight Street can be expected to play in the future. From the business point of view, a new merchandising concept is needed. Should the street be oriented toward the needs of the present Oak to Frederick trade area? Should it be a diverse and integrated district center serving the Frederick to Seventeenth Street population as well? Should it appeal to a larger region either with the aid of a major anchor tenant or through the cumulative attraction of a number of small and unique specialty shops?

Haight Street can also function as a community center. This "total" concept of the street implies a social significance requiring the presence of a wide range of nonretail uses to fulfill some of the social, cultural, recreational, and other needs of the community. One practical advantage to this approach is that it could form the basis for more widespread participation and support from groups with a variety of needs not directly related to commercial development.

Once a realizable vision for the street has been established, work can begin on developing the specific programs needed to bring about the kind of center desired. If success is to be achieved, the coordinated implementation of a comprehensive set of improvements must ultimately take place. Merchants must make the necessary improvements in their own stores and management assistance should be available to help them change to the new merchandising concepts. Property owners must make decisions in the selection of new tenants. Owners

and merchants alike must be willing to invest in the kinds of property improvements that can help change the face of the street. Realtors may be enlisted to attract key tenants. Banks must enter into more aggressive lending policies. The City and other public agencies must be willing to commit funds and expertise to make required public improvements such as those which relate to street beautification, transit, and the satisfaction of community needs which go beyond the limited concept of a retail shopping center. And, since Haight Street occupies a position of particular importance to the community, special care should be taken to involve residents of the Haight-Ashbury in the decisions and actions which affect them directly.

RESPONSES TO SELECTED QUESTIONS FROM THE SURVEY OF HAIGHT-ASHBURY RESIDENTS[1]

	Oak-Frederick[2]	Frederick-17th Street[2]	Fell-Fulton[2]
Where do you shop for the majority of your food?[3]			
Haight Street	23	2	--
Cole Street	3	17	--
Corner store	8	22	2
Petrini Plaza	20	22	15
Other store outside neighborhood	55	45	19
Where do you shop for such things as hardware & clothing?[3]			
Haight Street	29	3	3
Cole Street	3	23	--
Irving Street	7	12	1
Divisadero Street	2	--	1
Downtown	54	57	18
Other	32	32	13

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[1] The survey of residents was conducted in October of 1971. It included 57 questions covering a wide range of concerns. It was not specifically designed to determine consumer preferences or shopping habits. However, certain of the questions do have some degree of usefulness in this regard.

[2] Completed questionnaires were returned by 204 people: 87 from the area bounded by Stanyan-Oak-Baker-Frederick, 88 from the area bounded by Stanyan-Frederick-Buena Vista Park-17th Street, and 29 from the area bounded by Stanyan-Fulton-Baker-Fell.

[3] The total number of responses exceeds the number of respondents due to the fact that some people gave more than one answer to the question.

	Oak-Frederick	Frederick-17th Street	Fell-Fulton
Where do you shop for miscellaneous items such as small amounts of food, medicine, etc.?[3]			
Haight Street	55	10	1
Carl Street	6	9	0
Other neighborhood stores	22	60	20
Other	19	19	10
How often do you go to Haight Street?			
Daily	43%	--	--
Once or twice a week	28%	10%	25%
Infrequently	22%	47%	54%
Never	7%	43%	21%
Do you use Haight Street less now than previously?			
Yes	57%	77%	64%
No	43%	23%	36%

HAIGHT STREET BUILDING CONDITIONS SURVEY

Address ______________________ Date Inspected __________
Owner ______________________ Resides at ______________
Bldg.Type 1, 2, 3, 4, 5, HR-N No.Parking Spaces____ Date Built_______
Present Use:____ Story & Basement with ____ Dwlg.Units ____ Commercial
_____Guest Rooms with Cooking ______ Guest Rooms without Cooking
Assessed Value: Land $_______ Improvements $_______Block/Lot__________
Interior Inspection_______________ Exterior Survey__________

Exterior Deficiency G F P

Basement or Cellar G F P

Roof Area G F P

Public Space and Stairways G F P

Dwelling Units G F P

Commercial Units G F P
Bldg. Gross Area (Bldg.Dimensions)(Sq. Ft.) ______________
Store Net Sales Area____________ Possible Expansion__________
Store Front Footage ______________________

Store Frontage
Hose Bib Required____________ Yes________ No
Recessed Entrance Required_____ Yes________ No
Modernization Required________ Yes________ No
Frontage Cost Estimate $______________

Remarks:

Cost Estimate
Building $______________ Minimal $____________ Adequate
Store $______________ Minimal $____________ Adequate